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## Marti Family Trust - Multifamily Purchase

### **BUYER REPRESENTATION**

**Marti Family Trust - Multifamily Purchase / Broward County, FL**

### **SERVICES**

Strategic Capital Relocation Planning (SCRCP) is a system designed by The Conte Team at JC Commercial Realty Consultants. This system was used to guide The Marti Family Trust members to repatriate capital invested in Multifamily assets in New York City to Southeast Florida where the surviving Trust beneficiary resides.

### **SITUATION**

The patriarch of the Marti Family Trust had built significant Multifamily assets in New York City. Upon the Trustees passing the children deciding to begin the process of selling the first of several investment properties so that the beneficiaries could manage properties closer to where they lived. JC Commercial Realty Advisors worked diligently to identify and analyze as many viable investment properties within the proper debt to equity ratios.

### **PROCESS**

- Upon the formal engagement of JC Commercial Realty, several goals and outcomes were developed. The primary goal was to deliver income producing real estate within a set time frame to satisfy the IRS 1031 requirements.
- The JC Commercial Realty Team guided family members in all aspects of identifying, analyzing, financing, using qualified intermediaries, inspections and alike.
- During many strategy meetings the Marti family members were successfully prepared to acquire a large multifamily property in Pompano Beach, FL.

### **RESULTS**

The acquisition provided The Marti Family Trust to reinvest over 1 Million dollars in no capital gains liability in a timely way. The siblings are happy to operate and manage an income producing property within minutes of where they live in southeast Florida. Because the property has over 15 Tenants the risk allocation was also greatly mitigated in comparison to the New York property that was sold.

### **- REFERENCES AVAILABLE UPON REQUEST -**

The work described in this case study was performed by JC Commercial Realty Consultants references are available upon request.

